What's Hot?
- September's Meeting & Seminar
- Save the Date! November Seminar
- Community Corner Highlight - Get Engaged!
- August Meeting Recap

ENGAGEMENT!

September 2016 Volume 53, Issue 2

President's Message
St. Louis IIA Members -

Well the year got off to a great start. We had around 55 people join us for our August kick off meeting. We started with a presentation by Cassandra Ray the Finance Director of the Zoo. Cassandra spoke to us about her career path to get to the zoo, the zoo’s corporate structure, financing and future plans. At the end of her presentation Cassandra took questions and those in attendance learned more about how the zoo obtains the animals exhibited. Following Cassandra's presentation many of us went over the watch the Cardinals beat the Reds, 3 - 2.

Next up in September we have Jan Beckmann proving a meeting and seminar about Data Analytics. Jan will be covering topics from the basics of what is data analysis to best practices and when to use continuous analysis on your projects. The meeting and seminar are being held on September 22nd at CitiPlace 6. See the following page for registration details.

In addition to the IIA I know many of our members work with other charitable organizations and we would like to help you share those activities with our members. On page 4 of this newsletter you will see the Community Corner. This is a place where we are highlighting ways that our members engage with the community at large. If you have an organization you would like to highlight in the Community Corner please reach out to our officer group at iiastlouis@gmail.com and let us know. We would love to highlight your organization in an upcoming newsletter.

I look forward to engaging with more of you at the September meeting and throughout the year.

Regards,
Jen Murphy
2016-2017 Chapter President

St. Louis IIA Focus Newsletter

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## Meeting Information

**Location:** 6 CityPlace, First Floor  
Meeting Room  
Creve Couer, MO 63141  

**CPE credit:** 8 hour(s)  

**Registration:** 7:30 – 8:00 am  
**Meeting:** 8:00 am – 9:00 am  
**Seminar:** 9:00 am – 5:00 pm

## Cost & RSVP Information

**Meeting Only:** $35 (member) $40 (non-member) $28 (subscription)  

**Meeting and Seminar:** $280 (member) $320 (non-member)  

Full-time faculty and full-time students no charge  

Subscriptions may be used for this meeting and seminar  

Course registration requirements & cancellation policy (48 hours): [Click here to register](#)  

If you have any questions, please feel free to contact us @ IIAStLouis@gmail.com

## About the Meeting

This is a one day course designed for persons doing any type of data manipulation. From defining objectives to developing the report, steps you need to take to ensure the quality and integrity of the information provided. This course will apply to any tool used to perform analytics.

- What is data analysis?  
- How do you ensure quality?  
- What do you do when you get the answer?  
- How do you report the results?  
- Should the project be continuous analysis?  
- What are best practices?

### Instructor: Jan Beckmann, CPA, ACDA

Jan has been working in the audit profession for 20 years with Deloitte, Anheuser-Busch, ACL Services, and Brown Smith Wallace. She has spent her career developing ways to get to the root cause of issues to uncover practical solutions for organizations. In addition to accounting and auditing, Jan has developed expertise in data analysis and Internal Audit report writing. She combines her background and interest in journalism and editing with her technical audit knowledge to help multiple companies develop audit reports and Audit Committee presentations that produce results. For 6 years, Jan was one of the top ranked ACL trainers globally and has experience teaching training courses on multiple topics.
August Meeting Recap

Thank you to all of you that attended the kick off meeting and Cardinal’s game!! This year is gearing up to be one of the best yet!

A special thanks to Cassandra Ray, the Finance Director for the St. Louis Zoo, whom energetically shared her heartfelt personal story of how she arrived where she is today. Cassandra informed our members by discussing the background and history of our very own St. Louis Zoo. Additionally, she explained how our Zoo continues to be one of the very few Zoos in the nation that does not charge an admission fee to its patrons.

Following her presentation, Cassandra addressed the auditor’s questions in the room.

Next, we all made way to the stadium to cheer on the Cardinal’s vs. the Cincinnati Reds!! I personally love this kickoff meeting! Who wouldn’t enjoy meeting other IIA members while noshing on some brats, nachos and drinking a cold beverage. Making the night even better, the Cardinals held off the Reds to win 3 to 2!!

We look forward to seeing you all at the next meeting on September 22nd at CitiPlace 6. Jan Beckmann will be speaking on Data Analytics. So let’s stay engaged and energized!!
Join Our Community!

- Become a Member Today
- Visit Our Facebook Page
- Join Our Linkedin Group
- Follow Us On Twitter
- Subscribe to Our RSS Feed
- Instagram

Social Media Update

Kevin Dillon was our August winner of the $25 Amazon gift card for his participation during the Cardinals game.

For this month’s challenge we would like to know what types of outcomes/problems have data analytics helped you tackle? Share an idea/experience on our Facebook, Twitter, LinkedIn or Instagram pages for your chance to win the next $25 Amazon gift card.

Community Corner

The St. Louis Men’s Group Against Cancer is a nonprofit, charitable organization whose cause is raising funds for cancer research, prevention, and care. Funds are granted to various organizations and earmarked for specific programs in the thirty plus charities that benefit the St Louis cancer community, including groups such as The Children’s Miracle Network, American Cancer Society, Missouri Baptist Cancer Center, Camp Rainbow, BJC Healthcare, Alvin J. Siteman Cancer Center and The Cancer Support Community.

Each year the Committee Men organize several charitable events, with a majority of the funds raised at the fall Dinner Auction. The Dinner is attended by over 500 charitably minded men, community leaders, and local celebrities. The 2016 Dinner is being held the evening of Thursday, November 12th at the Ritz Carlton and features Legendary Football Coach and ESPN Analyst Lou Holtz. Individuals can participate by donating, by attending the event, or by providing gifts that can be auctioned off. Additional information can be found at http://stlmgac.org.
We HELP You MANAGE the DECISIONS Ahead.

Today’s business environment is more complex and competitive than it has ever been. Does your organization have a strategic plan—a roadmap—to guide future growth?

The Brown Smith Wallace Advisory Services team is committed to improving your business, increasing risk awareness and preparedness, and supporting you. Our professionals help public, private and public sector organizations address the roadblocks that can derail their path to success.

Learn how our team can help you maximize your opportunities and conquer your challenges. Visit bswllc.com or contact practice leader Ted Flom at 314.983.1294.

Sign up for Brown Smith Wallace news and insights at:
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# IIA - St. Louis Chapter
## 2016-2017 Programs Calendar

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<th>Month</th>
<th>Date</th>
<th>Meeting Type</th>
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<th>Time</th>
<th>Location</th>
<th>Speaker</th>
<th>Topic / Notes</th>
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<tr>
<td>September</td>
<td>9/22/2016</td>
<td>Meeting</td>
<td>8</td>
<td>8 AM - 5 PM</td>
<td>CitiPlace 6</td>
<td>Jan Beckmann</td>
<td>Data Analytics</td>
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<td>October</td>
<td>10/6/2016</td>
<td>Directors Reception</td>
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<td>6 PM - 8 PM</td>
<td>St. Louis Club</td>
<td>TBD</td>
<td>Audit Committee Chair Panel</td>
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<td>November</td>
<td>11/3/2016</td>
<td>Roundtable</td>
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<td>4:30 PM-6:30 PM</td>
<td>TBD</td>
<td>TBD</td>
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<td>November</td>
<td>11/10/2016</td>
<td>Seminar</td>
<td>8</td>
<td>8 AM - 5 PM</td>
<td>Sheraton Westport Chalet</td>
<td>Joan Pastor</td>
<td>TBD</td>
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<td>December</td>
<td>12/7/2016</td>
<td>Meeting &amp; Holiday Party</td>
<td>1</td>
<td>4 PM - 6 PM</td>
<td>Cortez Innovation Center</td>
<td>Judy Sindecuse</td>
<td>St. Louis Start Up Scene</td>
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<td>1/12/2017</td>
<td>Meeting</td>
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<td>8 AM - 10 AM</td>
<td>Frontenac Hilton</td>
<td>Nathan Mueller</td>
<td>Fraud/Ethics</td>
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<td>February</td>
<td>2/16/2017</td>
<td>Meeting</td>
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<td>5 PM - 7 PM</td>
<td>Frontenac Hilton</td>
<td>TBD</td>
<td>Student Night</td>
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<td>March</td>
<td>3/30/2017</td>
<td>Multi-track Conference</td>
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<td>8 AM - 5 PM</td>
<td>TBD</td>
<td>Various</td>
<td>IIA &amp; ACFE planning committee</td>
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<td>April</td>
<td>4/6/2017</td>
<td>Roundtable</td>
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<td>8 AM - 9 AM</td>
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<td>7</td>
<td>9 AM - 5 PM</td>
<td>TBD</td>
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<td>May</td>
<td>5/18/2017</td>
<td>Finale</td>
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<td>5 PM - 9 PM</td>
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**Congratulations to the following newly-certified members!**

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<td>Yavonne Field-Bagwell</td>
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<td>David Spihlmann</td>
<td>CIA</td>
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<td>18-Apr-16</td>
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<tr>
<td>Jonathan Halliwell</td>
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<td>29-Mar-16</td>
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<tr>
<td>Tracy Coble</td>
<td>CIA</td>
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<td>2-Jun-16</td>
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<tr>
<td>Carl Navales</td>
<td>CIA</td>
<td></td>
<td>6-Jul-16</td>
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<tr>
<td>Krista Marklin</td>
<td>CIA</td>
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<td>4-May-16</td>
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<td>Tiffany Bowen</td>
<td>CIA</td>
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<td>8-Jul-16</td>
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<td>Ann Wilhelm</td>
<td>CIA</td>
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<td>9-May-16</td>
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<tr>
<td>Lowell Boylan</td>
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<td>25-Mar-16</td>
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<td>Nicholas Jonathan</td>
<td>CIA</td>
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<td>30-Jun-16</td>
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<tr>
<td>Karis Kording</td>
<td>CIA</td>
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Save the Date! November Seminar

Influential Communication, Listening and Conflict Management and 2 hours of Ethics
November 10, 2016

Communication and Listening Skills: The Auditor’s Best Friend
By the time you finish this course, you will know exactly how to be, and perceived as an excellent listener and communicator through every step of the audit.

Conflict Management and Negotiation Skills for Auditors
Preventing, managing and resolving differences of opinion are a core IA competency: it should be your team’s strength, not its weakness. Learn excellent methods for gaining buy in and collaboration.

Challenging Ethical Situations Audit Professionals Personally Face (2 hours)
Professionals in finance, audit and risk are well aware of the numerous opportunities people have to operate in the “gray” areas of what is technically correct ethical behavior. Learn exactly what “ethics” and “ethical behavior” is and how it evolves, understand the psychology behind our behavior, and what research shows are the key ways we convince ourselves to do things we know are wrong…and so much more!

**Location, Time, Cost and RSVP Information:**
Sheraton Westport Chalet
Registration: 7:30-8:00 am
Seminar 8:00 am – 5:00 pm
Seminar $280 (member) $320 (non-member) $0 (subscription)
*Full-time faculty and full-time students no charge*

**Instructor:** Joan Pastor, Ph.D.
Joan is president of JPA International, Inc. and has been a professional international speaker, trainer and coach since 1979. She is well-known for her executive coaching, facilitation and consulting skills, and has worked with Fortune 100 companies, as well as a long list of executives in a wide variety of industries.

Registration will be open soon! Look for your email!

IIA’s Quality Assurance Review Committee

If you feel your IA shop can benefit from a ‘fresh set of eyes,’ contact me at:

David L. Richert, Jr.  CPA, CIA
Stifel Internal Audit Director
One Financial Plaza | 501 N. Broadway
St. Louis, MO 63102
314 342 3831
E-mail: richertd@stifel.com

Internal Audit (IA) performs as the eyes and ears of management, providing compliance, risk, assurance and operational coverage of the enterprise. But who audits the auditors? Why would auditors want to be audited?

The consistent application of the principles of the IIA’s Quality Assurance and Improvement Program (QAIP) is a goal for each IA shop. Converting this goal into practice and affirming the success of the QAIP can be realized by an independent assessment performed by a ‘fresh set of eyes’- experienced professionals who offer independent, objective evaluation services to an IA shop.

Also, if you would like to become that ‘fresh set of eyes,’ volunteer.

And lastly, these assessments earn [CAP points](#) for our Chapter!
LOOKING FOR A CHANGE?
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At Executive Business Solutions, **ebs**, we focus our vast experience in accounting and finance on one single mission – to find "the perfect fit" for you.

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- Senior Manager, Internal Audit
- Senior IT Auditors
- Manager, IT Audit

To learn more about our services or job opportunities, contact:

**Kelly Davidson**
Recruiting Manager
Kelly@ebsrecruiting.com
314.514.9501 ext. 230

**April Beatty**
President
April@ebsrecruiting.com
314.514.9501 ext. 225

[www.ebsrecruiting.com](http://www.ebsrecruiting.com)

1 Cityplace Drive, Suite 190
Creve Coeur, MO 63141
Enter CAP Points

The Chapter wants to achieve Platinum status again and we need your assistance…

If you have recently performed a speaking engagement, employed an intern, or written an article for a professional magazine or newsletter please complete the form at the end of this newsletter or better yet go to the chapter website and complete the on-line form “Enter CAP Points” tile under Quick Links or at…

https://secure.blueoctane.net/forms/AUYKXNT9ZAT0

Chapter Achievement Program (CAP)

CAP is the acronym for Chapter Achievement Program. The program has been established on the premise that the basic mission of the chapter is to serve its members first and then the internal audit profession. The program, sponsored by the International IIA, encourages local chapters to be active both for the benefit of the chapter members and of the local community.

Local chapters earn credits for the CAP through in the following categories: a) service to members; b) service to the profession, and c) chapter administration. The Chapter Achievement Program is made up of three performance levels: bronze (685 credits), silver (1,060 credits), and gold (1,560 credits). Thanks to your efforts, our chapter has attained gold status every year since 1997. After ten consecutive years of achieving gold, a chapter achieves Platinum level which this chapter has earned since 2006.

So what can a member do to earn CAP points for the chapter? Examples, include:

- Attend the monthly chapter meetings;
- Attend chapter sponsored seminars;
- Utilize the chapter sponsored Certified Internal Auditor (CIA) review course;
- Earn an IIA certification;
- Develop questions for the CIA exam;
- Recruit new members;
- Present speeches or training sessions;
- Write internal audit-related articles for publication;
- Provide an internal audit internship at your company for a student; and
- Come up with an innovative way to promote the chapter

So, it’s easy to contribute and it doesn’t take too much of an effort. You can report CAP activity on the chapter website or directly to the CAP Chairperson Brent Statler at bstatler@sccmo.org.
CPAs and advisors specializing in
internal audit, IT audit, cyber security
and business advisory services

RubinBrown’s Internal Audit Team is focused on reducing your risk and improving your business processes, both locally and globally. Our services include:

- Internal Audit
- IT Audit
- Cyber Security Advisory Services
- Sarbanes-Oxley Compliance & Post Merger Integration
- Process Improvement
- ERP & Segregation of Duties Tool Supported Analysis
- IIA Quality Assessment Reviews (QAR)
- IT Strategy
- IT Consulting & Due Diligence
- Enterprise Risk Management
- SOC1, SOC2, SOC3
- Security Assessments
- Data Analysis (ACL, IDEA)

In addition, RubinBrown has more than 40 professionals dedicated to business advisory services including:

- Bankruptcy Consulting
- Business Strategy
- Forensic Accounting
- Litigation Support
- Mergers & Acquisitions
- Valuation Analyses

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303.952.1220

Christina Solomon
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christina.solomon@rubinbrown.com
314.290.3497
### Chapter Contacts 2016-2017

<table>
<thead>
<tr>
<th>Chapter Officers</th>
<th>Executive Committee</th>
<th>1st Vice President Liaison</th>
<th>Education Committee</th>
</tr>
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<tbody>
<tr>
<td>President</td>
<td>Diane Cody</td>
<td>Rhonda Travers</td>
<td>Gail Peters</td>
</tr>
<tr>
<td>Jennifer Murphy</td>
<td>Ernst &amp; Young</td>
<td>Scottrade</td>
<td>Washington University</td>
</tr>
<tr>
<td>Protiviti</td>
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<td>(314) 965-1555 x2918</td>
<td>(314) 362-4915</td>
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<tr>
<td>(314) 656-1729</td>
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<td><a href="mailto:rtravers@scottrade.com">rtravers@scottrade.com</a></td>
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<td><a href="mailto:jennifer.murphy@protiviti.com">jennifer.murphy@protiviti.com</a></td>
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<td>First Vice President</td>
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<td>Brown Smith Wallace LLC</td>
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<tr>
<td>TricorBraun</td>
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<td><a href="mailto:Kate.Turner@thelacledegroup.com">Kate.Turner@thelacledegroup.com</a></td>
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<td>Brian Dobrynski</td>
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<tr>
<td>Lumiere Casino</td>
<td>(314) 983-1238</td>
<td>(314) 444-8927</td>
<td>(314) 875-2453</td>
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<tr>
<td><a href="mailto:susan@lumiereplace.com">susan@lumiereplace.com</a></td>
<td><a href="mailto:rstinekamp@bswllc.com">rstinekamp@bswllc.com</a></td>
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<td><a href="mailto:brian.dobrynski@firstclearing.com">brian.dobrynski@firstclearing.com</a></td>
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<td>Secretary</td>
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<tr>
<td>Treasurer</td>
<td>Kevin Dillon</td>
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<td>Christina Rousseau</td>
<td>St. Charles County</td>
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<tr>
<td>Wells Fargo</td>
<td>(636) 949-7455</td>
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<td><a href="mailto:Jason.r.minard@wellsfargo.com">Jason.r.minard@wellsfargo.com</a></td>
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<tr>
<th>Academic Relations - Co Chair</th>
<th>Budget and Finance – AP &amp; AR</th>
<th>Newsletter</th>
<th>Roundtables</th>
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<tr>
<td>Jerri L. Carrier</td>
<td>John Drury and Adam Rouse</td>
<td>Kelly Finke &amp; Josh Done</td>
<td>Jose Urbaez</td>
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<tr>
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<td>(314) 881-7439</td>
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<tr>
<td><a href="mailto:Jerri.L.Carrier@wellsfargo.com">Jerri.L.Carrier@wellsfargo.com</a></td>
<td><a href="mailto:john.drury@rubinbrown.com">john.drury@rubinbrown.com</a></td>
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<td>Paul Renner</td>
<td>Evan Gruenkemeyer</td>
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<td>(618) 604-1757</td>
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<td><a href="mailto:bdibwe@centene.com">bdibwe@centene.com</a></td>
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<td>Brent Statler</td>
<td>Brian Dobrynski &amp; Ted Flom</td>
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<td>Amy Ribick</td>
<td>Dave Richert &amp; Tim Grace</td>
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<td>Brown Smith Wallace</td>
<td>Stifel &amp; MorganFranklin Consulting</td>
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<td>(314) 342-3831 &amp; (314) 623-8216</td>
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<tr>
<td>TBD</td>
<td>Kelly Sendelbeck</td>
<td><a href="mailto:timothy.grace@morganfranklin.com">timothy.grace@morganfranklin.com</a></td>
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<td>(314) 656-1736</td>
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<td><a href="mailto:kelly.sendelbeck@protiviti.com">kelly.sendelbeck@protiviti.com</a></td>
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Platinum Pursuit
IIA–St. Louis Chapter
Report of CAP Activity

NAME: ________________________________________________________________

COMPANY: _____________________________________________________________

PHONE NUMBER: _______________________________________________________

TYPE OF ACTIVITY: (speaking, editorials, articles, research, student internships, etc.) ________________________________________________________________

TOPIC: (please attach agendas, articles) ______________________________________

LENGTH OF PROGRAM (# CPE hours): _______________________________________

DATE OF ACTIVITY: _____________________________________________________

LOCATION (city/state or country): ___________________________________________

DESCRIPTION / OTHER INFORMATION: _____________________________________________

______________________________________________________________________________

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Please send, fax, or e-mail to:

Brent Statler
St. Charles County Government
201 N. Second St. RM 526
St. Charles, MO 63301

Phone: 636-949-7455 Ext 1
Fax: 636-949-7467
bstatler@sccmo.org

Activity can also be reported via the Chapter website